

How can I use an IF statement in a Pivot Table Calculated Field in Excel?

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An IF statement can be used in a Pivot Table Calculated Field in Excel to perform conditional calculations based on specific criteria. This allows for more dynamic and customizable calculations within a pivot table. By using the IF statement, users can specify different actions to be taken based on whether a certain condition is met or not. This can be particularly useful in analyzing large and complex data sets, as it allows for the creation of more accurate and relevant calculations. Overall, utilizing an IF statement in a Pivot Table Calculated Field can greatly enhance the functionality and efficiency of pivot table analysis in Excel.

Excel: Use IF Statement in Pivot Table Calculated Field

The following step-by-step example shows how to use an IF statement in a calculated field of a pivot table in Excel.

Step 1: Enter the Data

First, let's enter the following dataset that contains information about sales transactions made by various employees at some company:

	A	B	C	D	E	F
1	Transaction ID	Sales Person	Revenue	Cost		
2	1001	Full-Time	130	25		
3	1002	Freelancer	120	40		
4	1003	Full-Time	115	30		
5	1004	Full-Time	115	30		
6	1005	Full-Time	205	25		
7	1006	Freelancer	120	25		
8	1007	Freelancer	145	35		
9	1008	Full-Time	150	40		
10	1009	Freelancer	180	45		
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Step 2: Create Helper Column

Our end goal will be to create a pivot table that uses a calculated field to calculate the following value:

(Sum of Revenue - Sum of Cost) * 0.3 IF sales person is Full-Time
 (Sum of Revenue - Sum of Cost) * 0.1 IF sales person is Freelancer

In order to use an IF statement in a calculated field, we will first need to create a helper column that assigns a value of 1 to each row with Full-Time as the sales person status or a value of 0 to each row with

Freelancer as the sales person status.

We'll type the following formula into cell E2:

=IF(B2="Full-Time", 1, 0)

We'll then click and drag this formula down to each remaining cell in column E:

	A	B	C	D	E	F
1	Transaction ID	Sales Person	Revenue	Cost	Helper	
2	1001	Full-Time	130	25	1	
3	1002	Freelancer	120	40	0	
4	1003	Full-Time	115	30	1	
5	1004	Full-Time	115	30	1	
6	1005	Full-Time	205	25	1	
7	1006	Freelancer	120	25	0	
8	1007	Freelancer	145	35	0	
9	1008	Full-Time	150	40	1	
10	1009	Freelancer	180	45	0	
11						
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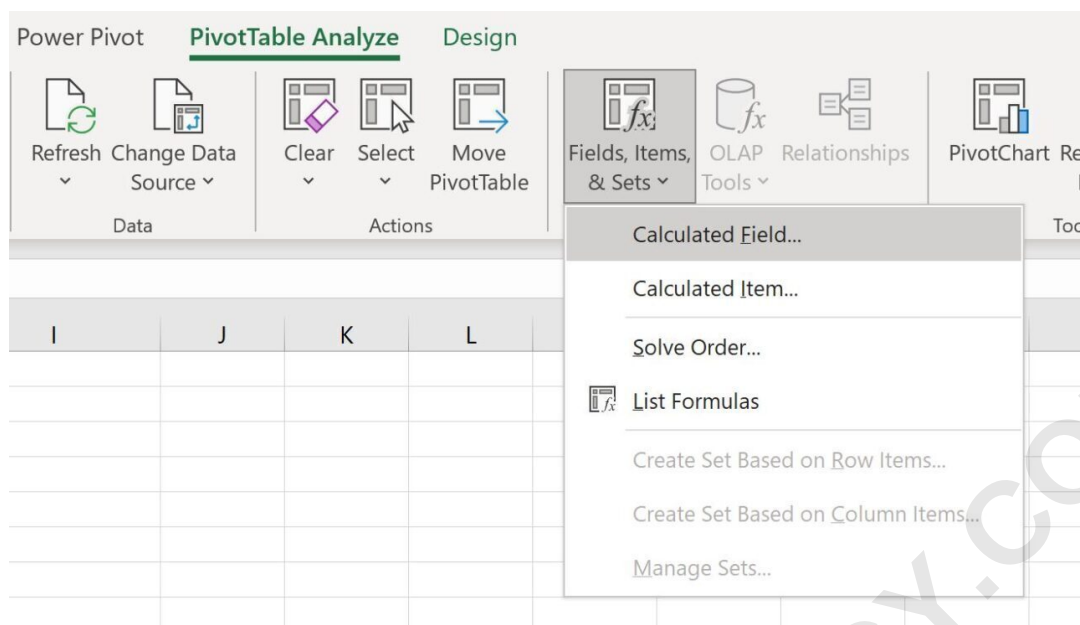
Step 3: Insert the Pivot Table

Next, we'll use this dataset to create the following pivot table:

	A	B	C	D	E	F
1	Transaction ID	Sales Person	Revenue	Cost	Helper	
2	1001	Full-Time	130	25	1	
3	1002	Freelancer	120	40	0	
4	1003	Full-Time	115	30	1	
5	1004	Full-Time	115	30	1	
6	1005	Full-Time	205	25	1	
7	1006	Freelancer	120	25	0	
8	1007	Freelancer	145	35	0	
9	1008	Full-Time	150	40	1	
10	1009	Freelancer	180	45	0	
11						
12	Row Labels	Sum of Revenue	Sum of Cost	Sum of Helper		
13	Freelancer	565	145	0		
14	Full-Time	715	150	5		
15	Grand Total	1280	295	5		
16						
17						
18						
19						
20						

Step 4: Add Calculated Field

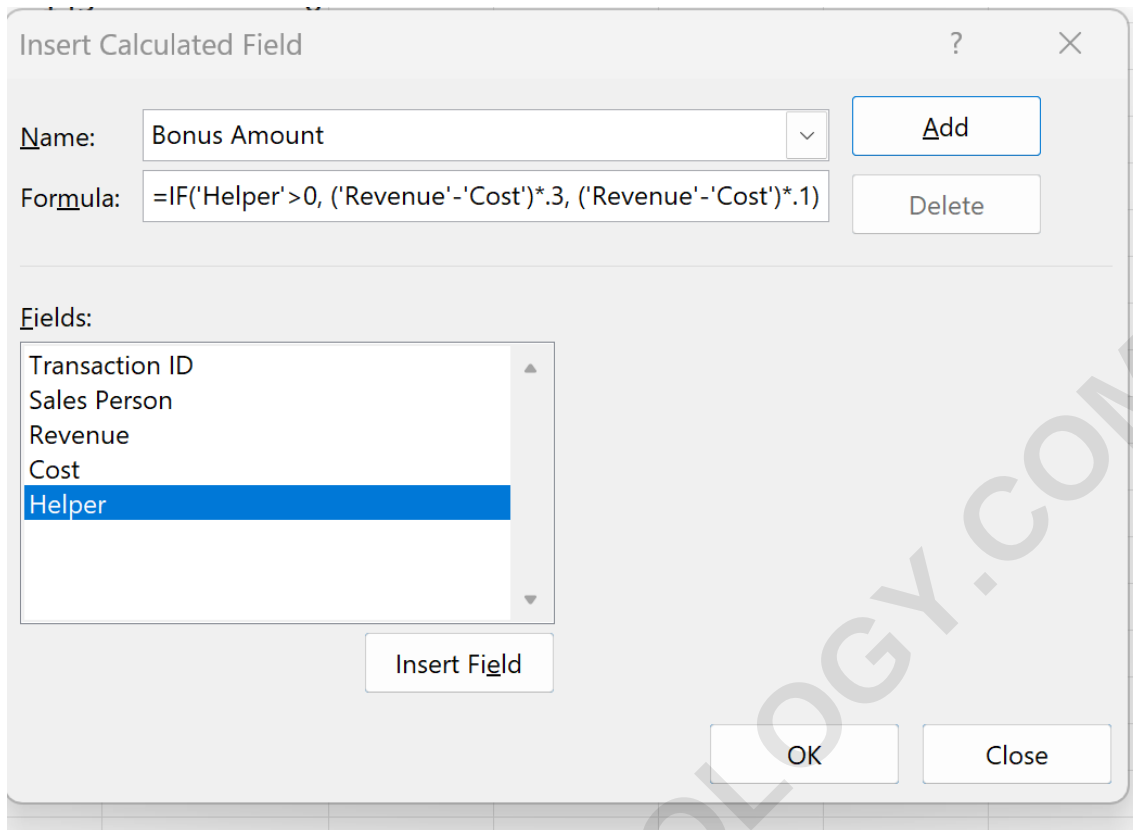
Next, we will add a calculated field to the pivot table by clicking on any value in the pivot table, then clicking the **PivotTable Analyze** tab, then clicking **Fields, Items & Sets**, then **Calculated Field**:



In the new window that appears, type "Bonus Amount" in the Name field, then type the following in the Formula field:

`=IF('Helper'>0, ('Revenue'-'Cost')*.3, ('Revenue'-'Cost')*.1)`

Then click Add, then click OK.



The image shows the 'Insert Calculated Field' dialog box in Microsoft Excel. The dialog has a title bar with a question mark and a close button. It contains the following elements:

- Name:** A text box containing 'Bonus Amount' and a dropdown arrow.
- Formula:** A text box containing the formula `=IF('Helper'>0, ('Revenue'-'Cost')*.3, ('Revenue'-'Cost')*.1)`.
- Buttons:** 'Add' (highlighted with a blue border), 'Delete', 'OK', and 'Close'.
- Fields:** A list box containing 'Transaction ID', 'Sales Person', 'Revenue', 'Cost', and 'Helper'. 'Helper' is selected and highlighted in blue.
- Insert Field:** A button located below the Fields list.

A large, diagonal watermark reading 'ARABPSYCHOLOGY.COM' is overlaid across the center of the dialog box.

This calculated field will automatically be added to the pivot table:

	A	B	C	D	E	F
1	Transaction ID	Sales Person	Revenue	Cost	Helper	
2	1001	Full-Time	130	25		1
3	1002	Freelancer	120	40		0
4	1003	Full-Time	115	30		1
5	1004	Full-Time	115	30		1
6	1005	Full-Time	205	25		1
7	1006	Freelancer	120	25		0
8	1007	Freelancer	145	35		0
9	1008	Full-Time	150	40		1
10	1009	Freelancer	180	45		0
11						
12	Row Labels	Sum of Revenue	Sum of Cost	Sum of Helper	Sum of Bonus Amount	
13	Freelancer	565	145	0		42
14	Full-Time	715	150	5		169.5
15	Grand Total	1280	295	5		295.5
16						
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We can see that the new column called Sum of Bonus Amount was able to successfully use an IF statement to calculate the bonus values.

In particular:

The bonus for freelancers was calculated as: $(565-145) * .1 = 42$
 The bonus for full-timers was calculated as: $(715-150) * .3 = 169.5$

Note: If you'd like to remove the helper column from the

final pivot table, simply right click on the Sum of Helper column in the pivot table and then click "Remove Sum of Helper" from the dropdown menu.

The following tutorials explain how to perform other common tasks in Excel:

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